



COUNTY OF LOS ANGELES  
Internal Services Department  
1100 North Eastern Avenue  
Los Angeles, California 90063



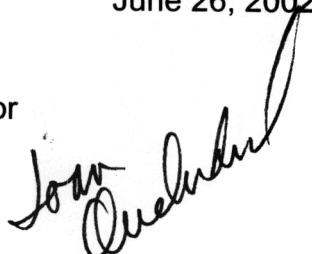
United We Stand

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Director

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June 26, 2002

To: Each Supervisor

From: Joan Ouderkirk  
Director 

Subject: **STATUS REPORT ON "BOLD STEPS FORWARD" AND THE  
INFORMATION TECHNOLOGY PROCUREMENT PROCESS**

This is a status report on initiatives identified in the "Bold Step Forward" report and a separate review related to enhancements to the Information Technology (IT) procurement practices. Specifically:

- On May 22, 2001, your Board directed the Internal Services Department (ISD) to set a timetable for completing all feasible "Bold Steps Forward" report recommendations or report on those that are not feasible within 90 days. Four status reports have been provided to your Board since that time documenting our work with the Contracts and Purchasing Task Force to complete implementation of the remaining feasible recommendations.
- On July 17, 2001 your Board instructed ISD to work with the Chief Administrative Office (CAO), Chief Information Office, and Office of Small Business (OSB) to conduct a review of departmental and vendors' concerns regarding the IT procurement process. A report describing the issues, concerns and potential actions was provided to your Board on October 17, 2001. That report also indicated that the IT procurement findings and recommendations would be incorporated into status reports on "Bold Steps Forward" because many of the topical areas and potential solutions were common to the Countywide contracting and purchasing process.

Since the last status report on February 27, 2002, work has continued on all outstanding Bold Steps and IT procurement recommendations and significant progress has been made. Specifically:

- ISD, working with County Counsel and appropriate departments, has developed a Local Small Business Enterprise (SBE) Preference Program using the State of California Department of General Services small business preference program as a guide. This Program was developed in response to one of the Bold Step Forward recommendations to "Establish a system of incentives and allowances

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for small businesses to compete effectively". A publicly noticed meeting with representatives from each of your offices was held on June 6, 2002 to discuss the proposed Program. The Board letter and Ordinance necessary to implement the Program is targeted for the July 9, 2002 agenda.

- A data retrieval system has been established that will capture information on the number of contracts awarded, amount involved, size of business by dollar volume and number of employees. ISD is working with the Office of Small Business to finalize reporting requirements.
- The 16-hour "Orientation to County Contracting Principles" developed as a collaborative effort between the Department of Human Resources, ISD, County Counsel, and the Auditor-Controller commenced in February 2002. To date, 350 staff have attended the mandatory training. An additional 500 staff are expected to attend by the end of December 2002. The response to the class has been overwhelmingly positive.
- A 100-hour contract training certificate program, "Leadership through Contracts Management and Administration", has also been developed in collaboration with Department of Human Resources, ISD, and County Counsel. One of the latest additions to the County's Training Academy, the program was approved by the California State University Northridge Faculty on Extended Learning and is scheduled to commence in September 2002. ISD and County Counsel will provide subject matter experts as faculty to deliver the program.

Attached is a list of the remaining Bold Steps and IT Procurement recommendations organized by topical area, with the status or solution identified for each area. The Office of Small Business and the Small Business Commission have been very supportive of our work to date and provided insight and possible alternative solutions. ISD appreciates their ongoing support and feedback. We are continuing to work on the remaining recommendations. We will report back to your Board in 90 days on the status of the remaining recommendations.

Please call me if you have any questions, or have your staff call Dave Lambertson at (323) 267-2103.

JO:kh

Attachments

c: Each Department Head  
Executive Officer, Board of Supervisors  
Office of Small Business  
Small Business Commission

**STATUS REPORT ON BOLD STEPS FORWARD  
AND INFORMATION TECHNOLOGY PROCUREMENT PROCESS  
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**Topical Area: Improving County Contracting and Purchasing Resources**

<b>Recommendation 1.4</b>	<b>Develop a comprehensive County Contracting and Purchasing Manual.</b>
<b>Recommendation 5.2</b>	<b>Utilize electronic mail capabilities now generally in place to send updates of manuals and other information to contract and procurement managers throughout the County.</b>
<b>IT Procurement Enhancement</b>	<b>As part of their Countywide Classification review, DHR should work with departments to identify and consider IT contracting, purchasing expertise and resource issues, including any training and recruitment concerns.</b>

Contracting and Purchasing are separate disciplines with different regulations, policies, and procedures. As a result, implementation of Recommendation 1.4 was segmented into the five individual manuals identified below. Specific status on each one is shown in the attached Exhibit 1.

Living Wage Program

- Insurance for Service Contracts

Construction Contracting

Purchasing

Service Contracts

In addition, staff from ISD, County Counsel, and the Auditor-Controller have collaborated on development and delivery of a 16-hour mandatory course for contracting staff titled "Orientation to Basic Principles of County Contracting". The training program commenced in February 2002 and to date 350 staff have attended the mandatory training. Subject matter experts from the three lead departments are participating as the faculty, and have also published an extensive course reference guide covering policies, procedures, best practices and practical guides to County contracting. The response from County staff has been very positive. The class is an important first step in filling a knowledge void, as there has been no formal training on contracting since 1984. In order to meet continued demand, classes are scheduled through the end of 2002 to train the remaining 500 staff.

In addition, the curriculum for the 100 hour contract training certificate program, "Leadership through Contracts Management and Administration", has been developed by Department of Human Resources, ISD, and County Counsel and approved by the California State University Northridge Faculty on Extended Learning. This program is scheduled to commence in September 2002. ISD and County Counsel will provide subject matter experts as faculty to deliver the program. The reference guide developed for the 16-hour program will be expanded and supplemented with case studies and class exercises.

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These two classes and corresponding reference guides will help meet the goal of this topical area. ISD is also involved in other educational forums. The ISD Purchasing Division is offering an ongoing full-day class on Procurement that has been well received. ISD also plays a lead role in the County Contracting Network and has encouraged all levels of contracting staff to attend the bi-monthly meetings. At each meeting there are breakout sessions that focus on small segments of the 16-hour class. In addition, ISD continues to update the reference material and provide updates to all contracting staff. The staff response has been very positive and as more people implement what they are learning, the contracting process should continue to improve.

Recommendation 5.2 has been implemented. The ISD Countywide Contract Policy and Procedures Section maintains current email lists of County contracting and purchasing staff. Updates to existing manuals, as well as new contracting and purchasing policies and procedures are distributed via email. Templates and model documents developed for the 16-hour class are also distributed electronically. Response from County staff has been very positive. Electronic notice is timelier than distribution of hardcopies and more accurately targets the personnel that need to be current in these areas. Purchasing and contracting policies approved by the Board have also been added to the "How to Do Business with the County" website that was developed in November 2001. Updates are posted on the site as they are approved. Future manuals will also be disseminated electronically and on the County's website.

The County Department IT Focus Group believed that, particularly in the area of IT Contracting, departments did not have sufficient IT Contract staff resources and that the lack of IT expertise in the contracting process was an impediment in developing timely and effective Requests for Proposals. These concerns have been referred to Department of Human Resources and they are currently examining these issues. Department of Human Resources convened an initial meeting of County Contract Managers to discuss IT contracting staff resource concerns and is determining what follow-up meetings are necessary.

With regards to specific IT contract training, staff responsible for IT contracting are being encouraged to take the 16-hour "Orientation to Basic Principles of County Contracting". Although not IT specific, the class is beneficial for anyone dealing with contracts. In addition, once the 100-hour class commences, DHR will review and assess requirements for additional training with respect to the feasibility of developing specific IT contract training through the Los Angeles County Training Academy.

**Topical Area: Improving Technology**

**Recommendation 1.9      Establish Countywide data standards for automation systems supporting purchasing and contracting to ensure that information can readily be passed back and forth between systems.**

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**Recommendation 2.15    Implement a tracking and monitoring system of County purchases and contracts.**

**IT Procurement                      Expand WebVen (the automated vendor registration system) to  
Enhancement                      include all Service Contractors.**

The goal of these recommendations is to effectively use technology in purchasing and contracting business operations. ISD continues to play a leadership role in automating certain processes and exploring the use of new technologies. The following initiatives have satisfied the goal of these three recommendations.

ISD, in concert with the Office of Small Business, has implemented a data tracking and retrieval system to quantify the number of contracts awarded, dollar amount involved, size of business by dollar volume and number of employees. The system also captures information on small business participation in County contracting. This computerized system is comprised of multiple online program applications that integrate with the Countywide Acquisition Management Information System (CAMIS) and includes:

- Online vendor registration (WebVen) to permit a vendor to create a business profile and identify the goods/services the business provides.
- Online notice of County department contracting and purchasing opportunities over \$10,000 on the County's Bid web page which is accessible from the County's Internet home page at [www.co.la.ca.us](http://www.co.la.ca.us) under "Doing Business with the County."
- Automatic e-mail notification of purchasing/contracting opportunities over \$10,000 to businesses registered in WebVen in the businesses' specific field(s) of interest.
- Online information on department awarded bids and contracts which is also accessible from the "Doing Business with the County" Internet home page.
- Ability to capture and provide information on solicitation and award information for all purchases and contracts over \$10,000 to any registered vendor including size of business, by number of employees and annual gross revenue, in addition to small business certification. ISD is currently working with the Office of Small Business to finalize reporting requirements in this regard.

On June 19, 2002 the CAO issued a memo to your Board this month regarding this system; advising departments of the following requirements to strengthen departmental compliance with Board-ordered posting requirements, as follows:

- All department heads will provide the CAO with an annual certification memorandum indicating full compliance with the Board directive of July 18, 2000 to post solicitation and award information over \$10,000 on the County's Bid web page.

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- Department staff will attach a printed copy of the Bid web page solicitation to a Board letter recommending a contract award when it is submitted to the requesting department head for signature and the letter is filed for a Board agenda.
- CAO analysts will review the Board letter to ensure compliance language is included and that the documentation of the solicitation posting on the Bid web page is attached.
- Departmental staff will include information in solicitation packages that informs potential bidders/proposers that to be awarded a contract/purchase order/commodity agreement, the vendor must be registered in WebVen, which is accessible on the Internet at [www.co.la.ca.us](http://www.co.la.ca.us) under "[Doing Business with the County.](#)"

**Topical Area: Enhancing Small Business Opportunities**

**Recommendation 4.1      Subdivide projects whenever feasible, legally, economically and physically, to make opportunities accessible to more contractors. Particularly consider subdividing by region.**

**Recommendation 4.2      Create a pilot program, to demonstrate feasibility of subdividing larger projects.**

The goal of these recommendations is to open up contracting opportunities for small businesses to compete by reducing the size of contracts. Several County departments have been active in contracting for services, such as custodial and landscape contracts, on a regional basis, which afford small businesses a better opportunity to compete. The expanded use of Master Agreements is also a viable solution to ensure business opportunities are available to small businesses (see Exhibit 2). Under the Master Agreement concept, vendors respond to a detailed solicitation document, usually a Request for Statement of Qualifications (RFSQ), with their qualifications. If qualified in accordance with the RFSQ, vendors will receive a Master Agreement that has been approved by the Board. Specific projects are bid to vendors in the appropriate category and award is made on low bid. Some agreements have set terms of one year or more. Others allow vendors to qualify at any time during the term of the agreement. Subcontracting opportunities are also available with the prime contractors.

Educating County staff on these contracting approaches and publicizing the availability of such opportunities to the vendor community is essential to enhance small business opportunities. The 16-hour DHR sponsored contract training covers the Master Agreement concept, as well as effective usage of regional or service provider area oriented contract solicitations. ISD has also developed a model solicitation document, which is included in the 16-hour reference material and has been made available electronically to County departments. As a result of the departmental and vendor interest in the Master Agreement concept, additional Master Agreements have been implemented since the last status report and new vendors have been qualified for several of the continuously open Master Agreements.

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**Topical Area: Small Businesses Preferences**

- Recommendation 2.11**      **Recognize and accept certification issued from other agencies that meet our County definition of “small business”.**
- Recommendation 4.7**      **Establish a system of incentives and allowances for small business to compete effectively.**
- Recommendation 4.9**      **Design a pilot race and gender-neutral allocation for small business participants, based on the Federal 8a model.**

The goal of these recommendations is to establish a system to give small businesses a competitive edge in obtaining business from the County. On May 22, 2001, your Board approved the Small Business Commission recommendation that the County accept certifications for disadvantaged/small business from the U.S. Small Business Administration, State of California Department of General Services, or any other authorized government agency. Your Board also instructed ISD to draft a small business preference program modeled after the State of California program. ISD, in conjunction with OSB, CAO, County Counsel and the Office of Affirmative Action Compliance (OAAC), has developed a Local SBE Preference Program, which is targeted for submission to the Board in July 2002. It is applicable to solicitations for the acquisition of goods and services, including construction, and provides for a five percent (5%) bid price reduction “preference” for County certified Local SBEs during the award determination process.

The CAO with the assistance of County Counsel, ISD, and OAAC, shall issue a Local SBE Preference Program Implementation Plan and provide staff training on implementation. OAAC will be responsible to verify eligibility and certify Local SBEs already certified as such by the State of California and maintain a record of those who participate in solicitations for the procurement of goods and services for the County. The Office of Small Business (OSB) will make businesses aware of the Local SBE Preference Program through its ongoing outreach activities and provide information regarding the Program on the OSB website. The County’s “How to do Business with Los Angeles County” website will be updated to include Local SBE Preference Program information. Implementation of the Local SBE Preference Program will satisfy these three recommendations.

**Topical Area: Vendor Relations**

- IT Procurement Enhancement**      **Establish a formalized Vendor Relations Office within ISD’s centralized Purchasing and Contract Services organization.**
- IT Procurement Enhancement**      **Establish a designated Purchasing and Contract advocate in each County department.**

ISD has requested “unmet needs” funding as part of the fiscal year 2002-03 budget process to establish a formalized Vendor Relations Office within ISD’s Purchasing and Contract Services.

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If approved, the office will address issues/concerns raised by vendors regarding their ability to successfully compete for County business and be the central point of contact in ISD for vendor inquiries, protests, and dissemination of information on County purchasing and contracting. This office will also administer the "How to do Business with the County" website.

In addition, a designated Purchasing and Contract Advocate in each County department needs to be established to ensure a single point of contact for vendor inquiries and complaints, as well as conduct outreach activities, disseminate information about policies and procedures and handle protests. ISD plans to coordinate a departmental Purchasing and Contract Advocate (PCA) Network similar to the existing Contract Managers Network. Departments will be asked to designate a representative and ISD will provide a forum for education, networking, information exchange, and coordinated outreach. Due to currently limited staff resources, implementation of this recommendation will be completed in conjunction with creation of the Vendor Relations Office.

**Topical Area: Solicitations**

- |                                   |                                                                                                                                                                                                       |
|-----------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Recommendation 4.13</b>        | <b>Develop and maintain one Countywide database of vendors with the ability to identify those which are "small business".</b>                                                                         |
| <b>Recommendation 4.15</b>        | <b>For smaller bids, ensure rotation of vendors on bidders lists, and inclusion of small businesses on such lists.</b>                                                                                |
| <b>Recommendation 4.16</b>        | <b>Require departments to solicit at least one firm certified as a "small business" to provide desired goods or services for purchases under \$25,000 and post award information on the Web Site.</b> |
| <b>IT Procurement Enhancement</b> | <b>Provide information to vendors on why they lost a bid.</b>                                                                                                                                         |
| <b>IT Procurement Enhancement</b> | <b>Provide vendors with a copy of the County's planned IT initiatives so that they may have advanced notice of IT related bid opportunities.</b>                                                      |

Recommendation 4.13 has been implemented through expansion of the WebVen registration process to allow vendors to identify their firm as "small business". Recommendations 4.15 and 4.16 were made before the threshold for posting purchasing and contracting opportunities to the website was reduced to \$10,000. Currently, automated notices of available opportunities over \$10,000 are made to all vendors registered in WebVen for that particular commodity or service. This ensures the widest exposure of the solicitation rather than narrowly targeting a few selected vendors as the recommendations suggest. Implementation of the Small Business Preference Program, as well as increasing the number of small businesses that register with the County will enhance small business opportunities.



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Currently, vendors may request that ISD provide a debriefing to explain why they lost a bid. If funding is allocated, that process will be consolidated in the proposed ISD Vendor Relations Office in order to ensure a consistent protocol is in place for vendor debriefings (see prior area). The 16-hour contract training also covers suggested protocol for, and benefits associated with, implementing vendor-debriefing processes. In addition, ISD will work with the Chief Information Office to provide any interested vendor a copy of the County's Fiscal Year 2002-03 Business Automation Plan as soon as it is completed (first quarter of 2002).

**Topical Area: General Process and Contracting Issues**

<b>IT Procurement Enhancement</b>	<b>ISD shall perform a review of the current Information Technology Agreement (ITSSMA) contracts process to determine if there are opportunities for streamlining current practices and procedures and will implement any improvements identified.</b>
<b>IT Procurement Enhancement</b>	<b>ISD shall also initiate a focus group of departments who currently perform a significant amount of their own IT contracting and the other central agencies involved (e.g., CIO, County Counsel, etc.) to determine if a standard, Countywide approach can be developed.</b>
<b>IT Procurement Enhancement</b>	<b>County Counsel shall review the concerns related to the standard terms and conditions (i.e., intellectual property rights, liability, indemnification and confidentiality) to determine what options are available to enable the County to enter into contracts with those firms who have previously declined to enter into existing County service contracts (e.g., ITSSMA, etc.)</b>

ITSSMA is a valuable tool for departments to obtain information technology services from technically approved pre-qualified vendors. However, Departmental and Vendor IT Enhancement Focus Groups identified several areas for review and improvement with an overall goal of streamlining the process, expediting time frames and improving the quality of County IT contracts. ISD has completed an in depth review of the ITSSMA process, including the vendor application process, ITSSMA awards, individual work order solicitations and awards, work order monitoring and vendor perception of ITSSMA. The study included interviews with ISD staff, a wide variety of other County departments' staff, and established ITSSMA vendors as well as potential ITSSMA vendors. The final report and corresponding recommendations is in the draft stage. In the interim, quick fix recommendations have been identified and implemented in both the vendor application process and solicitation response process. ISD has also streamlined the vendor qualifications submission process and received positive feedback from County staff and the vendor community. The actual vendor qualifications process is currently being revised for placement on the County's website in a format that would allow electronic completion and submission back to ISD for processing.

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Members from both the focus groups, and the vendors surveyed during the ITSSMA study, have expressed concerns with certain of the County's standard contract terms and conditions related to intellectual property rights, liability, indemnification, performance security and confidentiality, particularly as they relate to contracts for services and the manner in which they may discourage many large firms from participating in the master agreement process. County Counsel, CIO, CAO Risk Management, and ISD are considering the consequences associated with relaxing these provisions. Since risk exposure differs from project to project, there is no "one size fits all" set of relaxed provisions that is recommended for inclusion in ITSSMA terms and conditions. However, a series of alternative provisions that can be tailored to a particular project is being developed and will be included in the final ITSSMA report.

**Topical Area: Open up Subcontracting Opportunities to Small Businesses**

- Recommendation 4.3      Require or encourage subcontracting, preferably to small businesses.**
- Recommendation 4.4      Establish a pilot-subcontracting program.**
- Recommendation 4.5      Include Good Faith Effort requirements as one of the criteria for evaluating lowest responsible bidder.**
- Recommendation 4.6      Include State and County "Good Faith" requirements in standard contract language.**

These recommendations are aimed at providing subcontracting opportunities to small businesses by placing the responsibility on the prime or general contractors. Educating both the County departments and potential vendors on the appropriate use of subcontracts is necessary as most subcontracting is done in the construction related contracts handled by Public Works and ISD. The County's standard subcontracting clause in service contracts allows subcontracting if the prime and subcontractors sign a written agreement with County terms and conditions and the County approves the agreement. Appropriate use and monitoring of subcontracting is covered in the 16-hour contract training. An explanation of standard County terms and conditions, as well as policies applicable to all contractors and subcontractors, is already available on the "How to do Business Website". During the County Contracting Network Meeting held on June 18, 2002, subcontracting was discussed in a well attended breakout session.

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**STATUS OF MANUALS**

<b>Manual</b>	<b>Description</b>	<b>Status</b>
Living Wage Program	Covers the Living Wage Program set forth in County Code for Proposition A and cafeteria services contracts and includes implementation plans approved by the Board, solicitation and contract language, required forms, and proposal/bid evaluation processes.	ISD originally published the manual in November 1999 and updates it as Living Wage Program changes occur. Updates are distributed via email broadcast to all manual holders. ISD, in conjunction with Office of Affirmative Action Compliance, also provides training for County contracting staff as program changes occur. The fourth revision was issued on June 20, 2002. Conversion of the manual for website access has been delayed until the entire manual has been reissued due to the number of changes required in the last 6sixmonths. This conversion is targeted for Fall 2002.
Insurance for Service Contracts	Covers indemnification and insurance requirements for all service contracts. Includes solicitation and contract language, sample insurance certificates, and the SPARTA insurance program geared for small businesses.	The Chief Administrative Office (CAO) Risk Management Section published the manual in June 2000. Updates will be made as program changes occur and ISD will assist the CAO in distributing them via email broadcast to contracting staff. Insurance program and policy information excerpted from the manual is currently available on the CAO's website.
Construction Contracting	Covers policies and procedures for construction contracts and related services, such as architects and engineers, which are subject to the provisions of State of California Public Contracting Code.	The Department of Public Works (DPW) issued the hardcopy policy and procedure manual and posted it on the DPW website in January 2002. There is also a direct link to the manual from the County's "How to Do Business" website.

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**STATUS OF MANUALS**

<b>Manual</b>	<b>Description</b>	<b>Status</b>
Purchasing	Covers policies and procedures for service contracts under \$100,000 and procurement of all commodities that are subject to the provisions of the State of California Government Code.	ISD completed the update to the Purchasing Manual in December 2001 and disseminated the document to appropriate County purchasing staff. It is available in electronic format on the County's website.
Service Contracts	Covers policies and procedures for service contracts over \$100,000 that are subject to the provisions of the State of California Government Code, as well as Proposition A service contracts subject to the provisions of the County Code.	In concert with subject matter experts from County Counsel and Auditor-Controller, ISD has developed an extensive reference guide of policies, procedures, best practices and practical advice for the "Orientation to County Contracting Principles" class. The reference guide was published in February 2002 and continues to be updated as changes in the County's processes occur. A companion 'How to' Guide is being developed to supplement the reference guide and is targeted for completion in July 2002. The finished products will be made available on the County's website.

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EXAMPLES OF MASTER AGREEMENTS

**Information Technology Support Services Master Agreements (ITSSMA):** Over 140 pre-qualified vendors are under agreement to provide a range of Information Technology services in eleven different categories.

**Communications Support Services Master Agreements (CSSMA):** Eighteen vendors are under agreement to provide a pool of readily available skilled telecommunications technical and engineering support professionals to supplement in-house staff and help meet fluctuating workloads.

**Job Order Contract (JOC) Agreements:** These agreements are with general contractors and several specialty contractors to provide facilities repair, deferred maintenance and refurbishment services requested by County departments. Ten agreements were recently approved for a one-year period. Six are certified CBE vendors. As reported in ISD's quarterly report on JOC usage, the size of the initial award was reduced in order to reduce bonding requirements that place a burden on small businesses.

**Architect and Engineering Master Agreements:** Ten firms have one-year contracts for as needed services related to repair and refurbishment projects undertaken by ISD.

**Energy Support Services Master Agreement (ESSMA):** An agreement for various services with eight energy-consulting firms.

**Audit and Consulting Services:** The Auditor-Controller has a number of firms under agreement to provide auditing and consulting services to all County departments. They are in the process of soliciting qualified firms for the upcoming contracts.

**Strategic Planning Consultants:** The CAO has sixteen firms under agreement to provide as-needed strategic planning and related consulting services to the County departments.

**Telecommunication Support Services Master Agreement (TSSMA):** ISD has sixteen firms under agreement for as-needed telecommunications equipment installation and related support services.

UPCOMING MASTER AGREEMENTS

**Customer Service Training:** DHR is preparing a RFSQ for as-needed customer service training for use by all County departments.